



Everest Group Guidewire Services PEAK Matrix® Assessment 2026

Focus on Deloitte

June 2026



Introduction

Insurance enterprises no longer approach Guidewire programs as one-time core replacement initiatives. As cloud adoption matures, the market is shifting toward value realization from existing Guidewire estates, faster product change, lower-customization implementation models, stronger digital experiences, and more data- and AI-enabled operations. Carriers are also placing greater emphasis on underwriting agility, claims efficiency, and distribution modernization as they look to improve speed-to-market and respond faster to changing market conditions.

Guidewire's product direction is broadening the scope of transformation beyond traditional InsuranceSuite implementation. Market activity in 2026 is increasingly tied to cloud value realization, biannual release readiness, APD-enabled product agility, Jutro-led digital journeys, and AI-infused workflows, alongside new areas such as PricingCenter and UnderwritingCenter. These themes are becoming more relevant as insurers evaluate how to monetize cloud investments, improve product and pricing responsiveness, and embed intelligence more directly into underwriting, claims, and servicing workflows. This shift is changing how service providers position and invest in the Guidewire ecosystem.

Against this backdrop, the [Guidewire Services PEAK Matrix® Assessment 2026](#) evaluates providers on their ability to support the next phase of insurer demand, spanning core modernization, cloud transition, value realization, ecosystem integration, and AI-enabled transformation, while also assessing the maturity of their market impact, delivery footprint, innovation investments, and strategic direction.

The full report includes the profiles of the following 31 leading Guidewire service providers featured on the Guidewire Services PEAK Matrix®

Assessment 2026:

- **Leaders:** Accenture, Capgemini, CGI, Cognizant, Deloitte, EY, HCLTech, PwC, TCS, ValueMomentum, and Zensar Technologies
- **Major Contenders:** Alchemy Technology Services, BlitzenX Solutions, Centric Consulting, Coforge, Exavalu, GFT Technologies, HTC Global Services, IKOR, Infosys, LTM, SBI Technology, Sollers Consulting, Stratus, Tech Mahindra, and Wipro
- **Aspirants:** Acini, Aspire Systems, Birlasoft, Norima Consulting, and Protecons Solutions

Scope of this report

Geography: global

Industry: P&C insurance

Services: Guidewire services

Scope of the assessment

Services in scope

Consulting services

Supporting clients across product selection, feasibility assessments, roadmap creation, strategy, change management, etc.

Implementation services

Supporting clients across requirements gathering, technical and functional design, data conversion, testing, workload integration system and process configuration, and deployment

Upgradation and migration services

Supporting clients with version upgrades, data migration, testing, and cloud migration

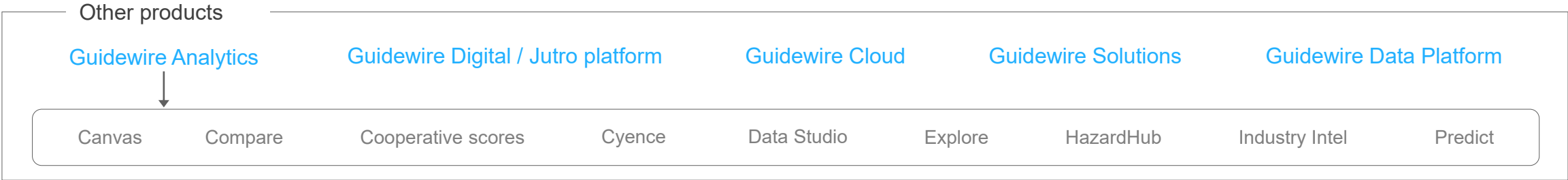
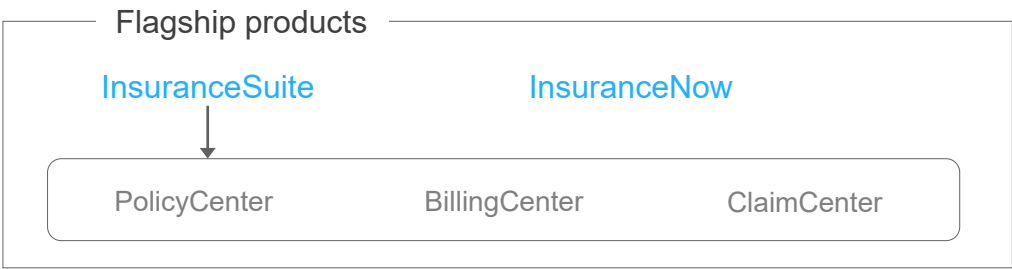
Enhancement services

Supporting clients with L2 and L3 customization features and value-add features through bespoke development, API integration, testing, etc.

Maintenance and support services

Supporting clients across helpdesk, incident management, service request management, testing, issue resolution, service governance, and documentation

Guidewire products under consideration

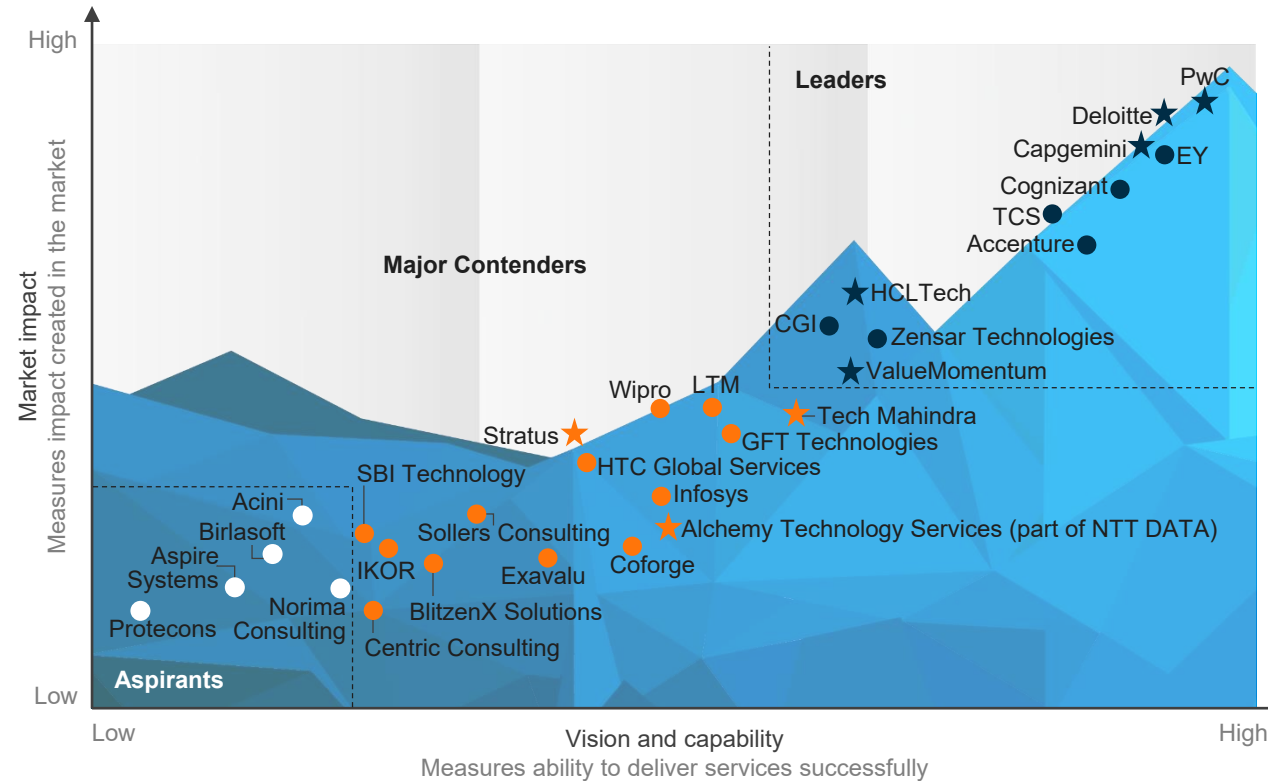


Everest Group PEAK Matrix®

Guidewire Services PEAK Matrix® Assessment 2026 | Deloitte is a Leader and a Star Performer

Everest Group Guidewire Services PEAK Matrix® Assessment 2026^{1,2,3}

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



¹ Assessment for Aspire Systems, Exavalu, IKOR, Norima Consulting, SBI Technology, and Sollers Consulting excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with insurance buyers

² Alchemy Technology Services' positioning reflects the combined Guidewire services capabilities of Alchemy Technology Services and NTT DATA, following NTT DATA's acquisition of Alchemy Technology Services in October 2025

³ Analysis for Stratus and Infosys is based on their independent capabilities; assessment was completed before Infosys announced its acquisition of Stratus in March 2026

Source: Everest Group (2026)

Deloitte

Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- It brings scaled Guidewire practice with formal specialization depth, underpinned by Global Premier partner status, broad certifications coverage, and a structured global delivery model
- It differentiates through a business-led, multi-disciplinary value proposition that combines Guidewire implementation with strategy, actuarial, underwriting, change management, cloud, data, and engineering capabilities, reinforced by a broad partner ecosystem
- It has made meaningful investments in Guidewire-specific accelerators and AI-led assets such as Ascend AI, ClaimBeacon, submission automation, state rollout toolkit, and Guidewire Marketplace product models, which enhance delivery efficiency and support next-generation claims, underwriting, and SDLC use cases
- Buyer feedback reinforces Deloitte’s domain depth and partnership-oriented delivery model. Clients highlighted P&C insurance business understanding, strong inception support, technical expertise, proactive communication, and the ability to work as an extension of the client team rather than as a narrow implementation vendor

Limitations

- Its market positioning appears the strongest in large, fixed-price transformation programs; there is room to broaden flexibility in commercial and delivery models for run, growth, and smaller scope change work. This could improve relevance with buyers seeking a partner for more modular Guidewire enhancement or managed change constructs
- Deloitte’s Guidewire presence remains the strongest in North America; despite recent momentum, its partnership standing and scaled traction in EMEA and APAC still trail some similar-sized peers
- While Deloitte has invested heavily in AI-led assets and ecosystem enhancements, buyer feedback indicates room to translate these capabilities more consistently into visible client value, especially through more proactive innovation and stronger ecosystem enablement
- A few clients highlighted expectations around more agile communication of upgrade-driven changes and stronger day-to-day transparency, including proactive recommendations for alternatives beyond the original scope and more consistent knowledge transfer

Market trends

Cloud value realization, product agility, and AI-enabled underwriting and claims are reshaping demand for Guidewire services

Market size and growth

- The total Guidewire services market is estimated to be ~US\$3.5-3.7 billion for calendar year 2025
- Everest Group estimates that the Guidewire services market grew at approximately 14-16% between 2024 and 2025, supported by continued demand for cloud migrations, upgrades, enhancements, and maintenance services
- While North America still represents the largest share of the market, APAC and Continental Europe are emerging as faster growth pockets as Guidewire expands cloud adoption, ecosystem depth, and regional reach

Key drivers for Guidewire services

Cloud value realization and GWCP migration	Demand is shifting from first-wave core replacement to cloud migration, biannual release adoption, and post-migration optimization. Carriers increasingly fall into three buckets: moving to cloud, optimizing cloud estates, or embedding AI on top of cloud.
Product agility and new Guidewire layers	Guidewire's direction around APD, Jutro, PricingCenter, and AI-assisted underwriting/claims workflows is increasing focus on faster product launch, pricing responsiveness, and lower-customization delivery.
AI and ecosystem-led augmentation	Demand is rising for AI-led intake, triage, testing, and SDLC acceleration, alongside broader ecosystem integration across data, payments, forms, and third-party solutions.
Mid-tier and specialty growth pockets	Demand is broadening beyond early tier-1 movers toward mid-tier, specialty, and selected MGA-led opportunities, especially where carriers want modular modernization and faster value realization.

Opportunities and challenges

Pricing and underwriting whitespace	New Guidewire-led directions in pricing and underwriting create whitespaces for providers that can combine platform skills with actuarial, product, and workflow expertise.
Jutro as attached support, not default choice	Jutro is increasingly bundled into cloud programs, but stand-alone RoI remains mixed and buyer fit varies by LoB, buyer size, and existing portal strategy.
Data and release readiness	Carriers need stronger data access, governance, and release automation to capture value from AI, analytics, and more frequent updates.
Talent, localization, and packaged plays	Providers need deeper cloud-/AI-ready talent, stronger localization, and more repeatable packaged assets to scale beyond incumbent transformation programs.

Provider landscape analysis

Market share analysis of providers¹

2025; percentage of overall market for Guidewire services



¹ Providers are listed alphabetically within each range

Provider market share by YoY growth¹

2024-25; increase in percentage of revenue for Guidewire services



Key buyer considerations

Key sourcing criteria

High



Realize value from Guidewire, not just migrate to it

Buyers should prioritize providers that can link Guidewire programs to product simplification, operating-model change, digital claims / underwriting outcomes, and business-value realization, rather than treat cloud as a lift-and-shift exercise.



Choose partners that can industrialize Guidewire Cloud and release adoption

Buyers should evaluate providers on their ability to run GWCP migrations, biannual releases, cloud upgrades, and post-go-live optimization with strong automation, lower execution risk, and clear operating-model support.



Demand for APD, Jutro, and new product readiness, but with fit-for-purpose judgment

Buyers should look for providers that can activate APD, Jutro, and new Guidewire-led capabilities such as pricing/underwriting-adjacent workflows, while also being pragmatic on where these fit and where RoI may still be mixed.



Prioritize data, integration, and ecosystem engineering depth

Choose partners with strong data, API, and ecosystem integration capability so AI, analytics, and digital work can scale



Assess sustainable Guidewire talent and advisory depth

Favor providers with Guidewire-native talent, automation-led delivery, and repeatable accelerators across the SDLC

Low

Priority

Summary analysis

Guidewire buyers are increasingly moving beyond first-wave core transformation toward cloud value realization, product agility, and AI-enabled business outcomes. The market is no longer defined only by who can implement InsuranceSuite; buyers now expect partners to help unlock value from APD, Jutro, cloud-native features, analytics, and new Guidewire directions such as pricing- and underwriting-related capabilities.

At the same time, buyers are becoming more selective about where they want standardization versus flexibility. They want providers that can support industrialized cloud delivery and release readiness but also work within a loosely coupled ecosystem across portals, data platforms, pricing, claims, and third-party InsurTech solutions. This is increasing the importance of advisory capability, ecosystem orchestration, and tool-led delivery acceleration in provider selection.

Finally, talent and execution discipline remain gating factors. As Guidewire introduces more frequent releases and expands into new capabilities, buyers are looking for providers that can combine Guidewire-native talent, AI-enabled engineering, and strong governance to sustain modernization momentum beyond go-live.

Key takeaways for buyers

Guidewire services demand is being shaped by cloud value realization, biannual release adoption, and carriers' push for faster product and pricing change. Buyers are prioritizing partners that can industrialize cloud delivery, activate new Guidewire layers such as APD / Jutro / pricing- and underwriting-related capabilities where relevant, and sustain strong data, integration, and release discipline post-go-live.



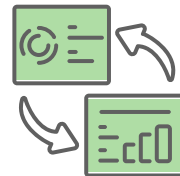
Choose partners that can realize value from Guidewire Cloud

Prioritize providers that can migrate and optimize GWCP, absorb biannual releases, and connect cloud programs to measurable product, pricing, and operating-model outcomes



Demand data, integration, and ecosystem readiness

Select providers with strong API / integration patterns, data modernization, and reusable connectors so digital, analytics, and AI use cases can scale beyond the core



Assess product agility and AI-enabled operations

Evaluate provider capability in APD, Jutro, pricing/ underwriting-adjacent workflows, and AI-led testing, triage, and SDLC acceleration, but require production-grade proof, not just pilots

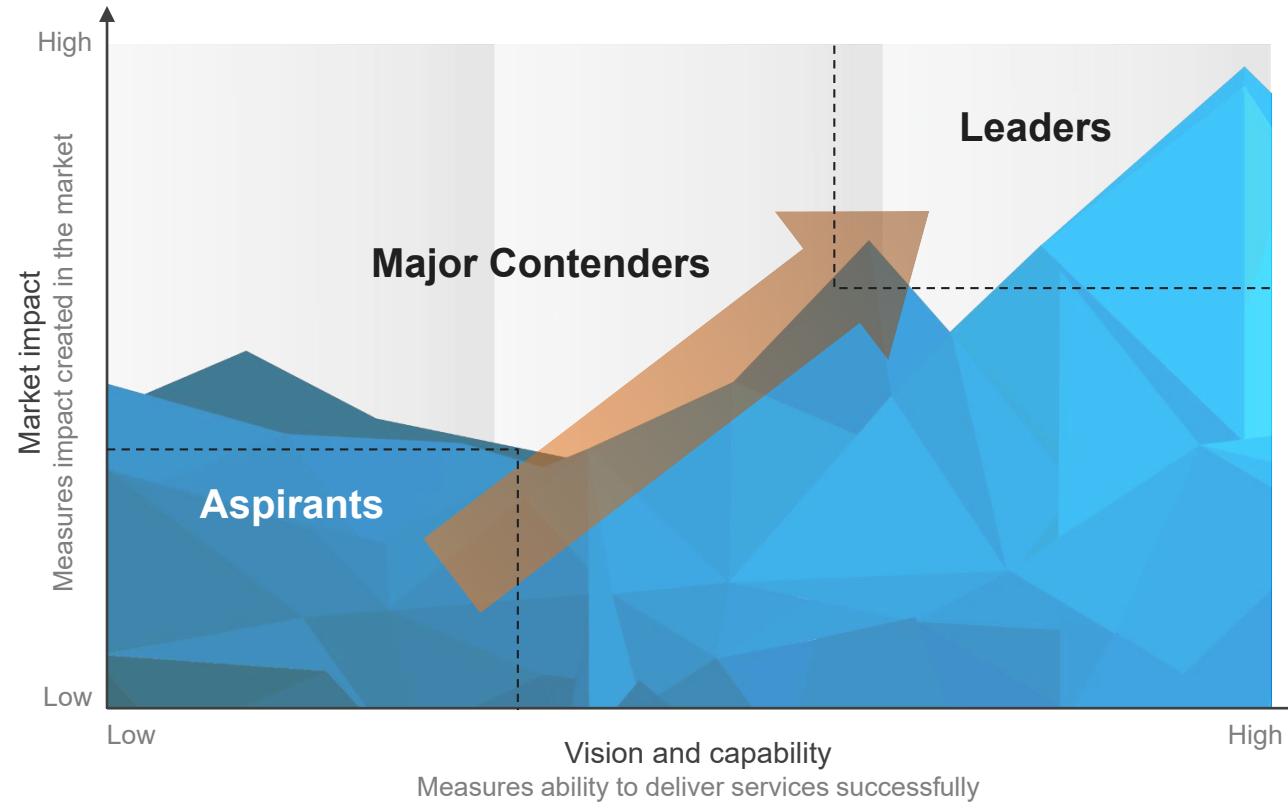
Appendix

PEAK Matrix® framework

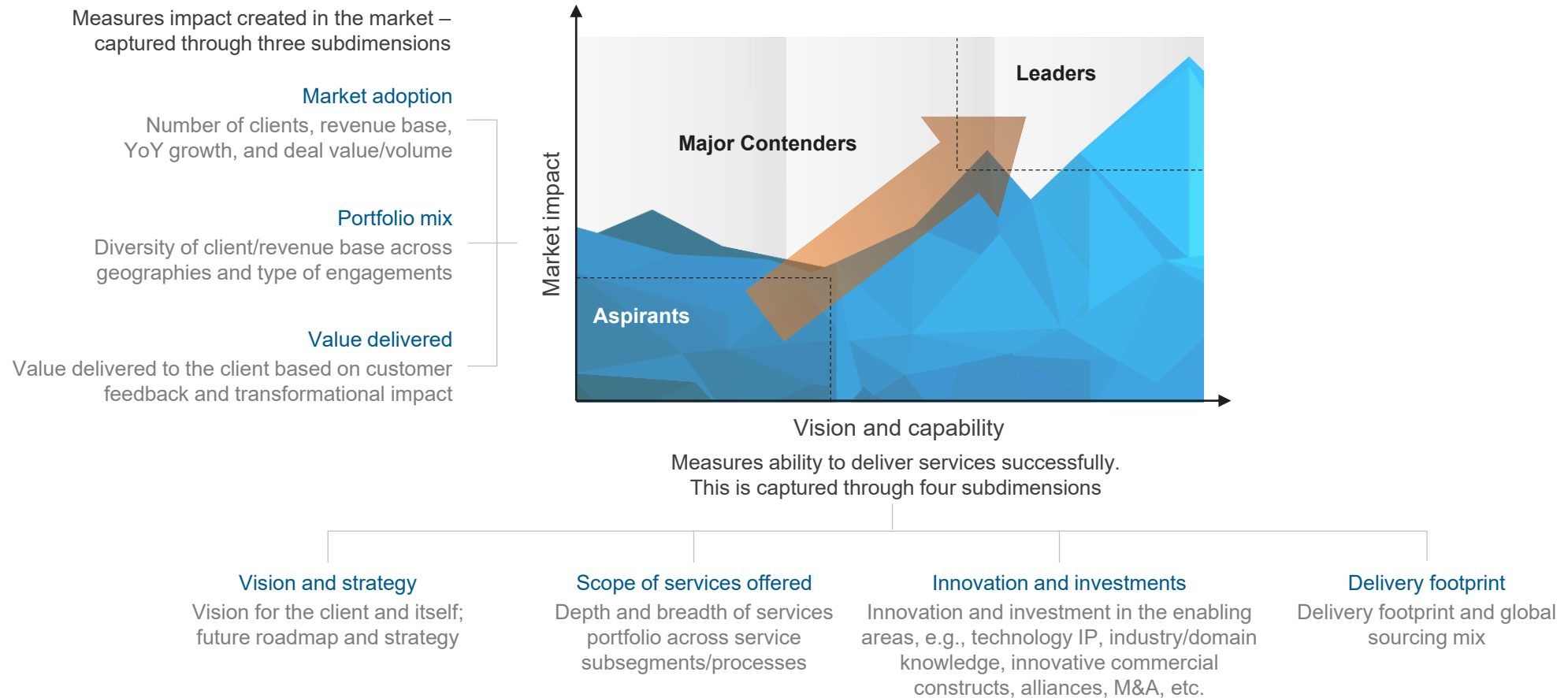
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



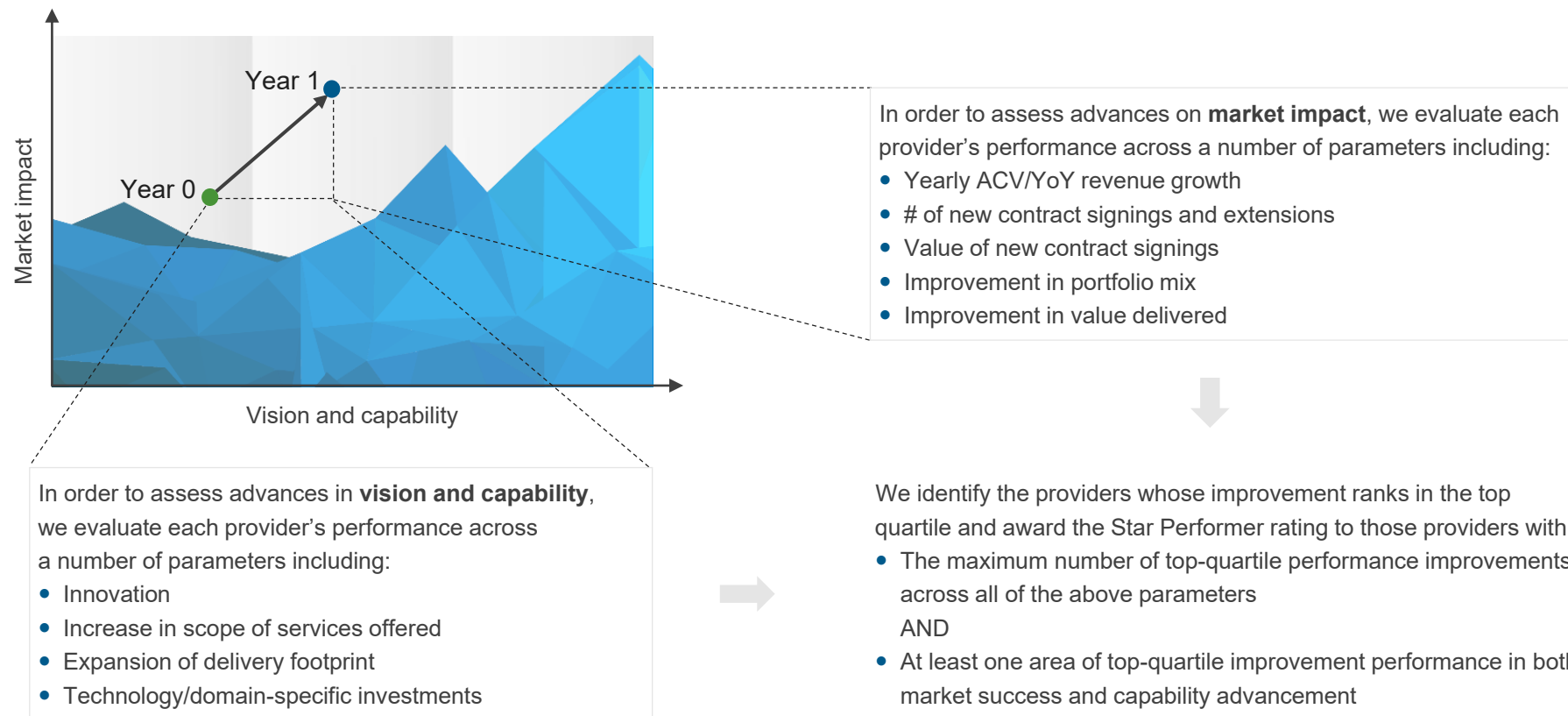
Services PEAK Matrix® evaluation dimensions



Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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